



Washington State
DEPARTMENT OF
ENTERPRISE SERVICES

Enterprise Procurement Policy Update

Enterprise Procurement Policy Team
Contracts & Procurement Division

JANUARY 17, 2024

AGENDA

- Procurement Risk Assessment
- Enterprise Policy Updates
 - Refreshes
 - Revisions
 - New Policies
- Questions

PROCUREMENT RISK ASSESSMENT

APPROACH

2024 Procurement Risk Assessment

- Contract audit focus
- 1-year cycle, test run
- Using sprints
- No impact to current delegated authority amounts, unless by specific request



GOALS

2024 Procurement Risk Assessment

Add value for both the customer and DES by:

- Reducing workload/burden for agencies
- Improving process
- Defining the process
- Baseline for new policies



CRITERIA

2024 Procurement Risk Assessment

The test run will be based on random contract audits, focusing on the following enterprise procurement policies:

- Supplier Diversity Policy
- Environmental Procurement Purchasing Preference Policies

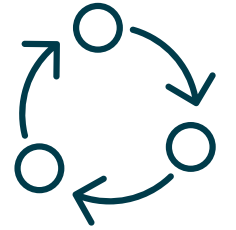
The audits will assess compliance with the policies and suggest areas for improvement.



NEXT STEPS

2024 Procurement Risk Assessment

- Obtain initial feedback from PCAG:
 - What will be the best way for DES to obtain contract related documents that are not posted on WEBS?
- DES leadership review and approval.
- DES will be seeking stakeholder input to the new assessment format in the near future.



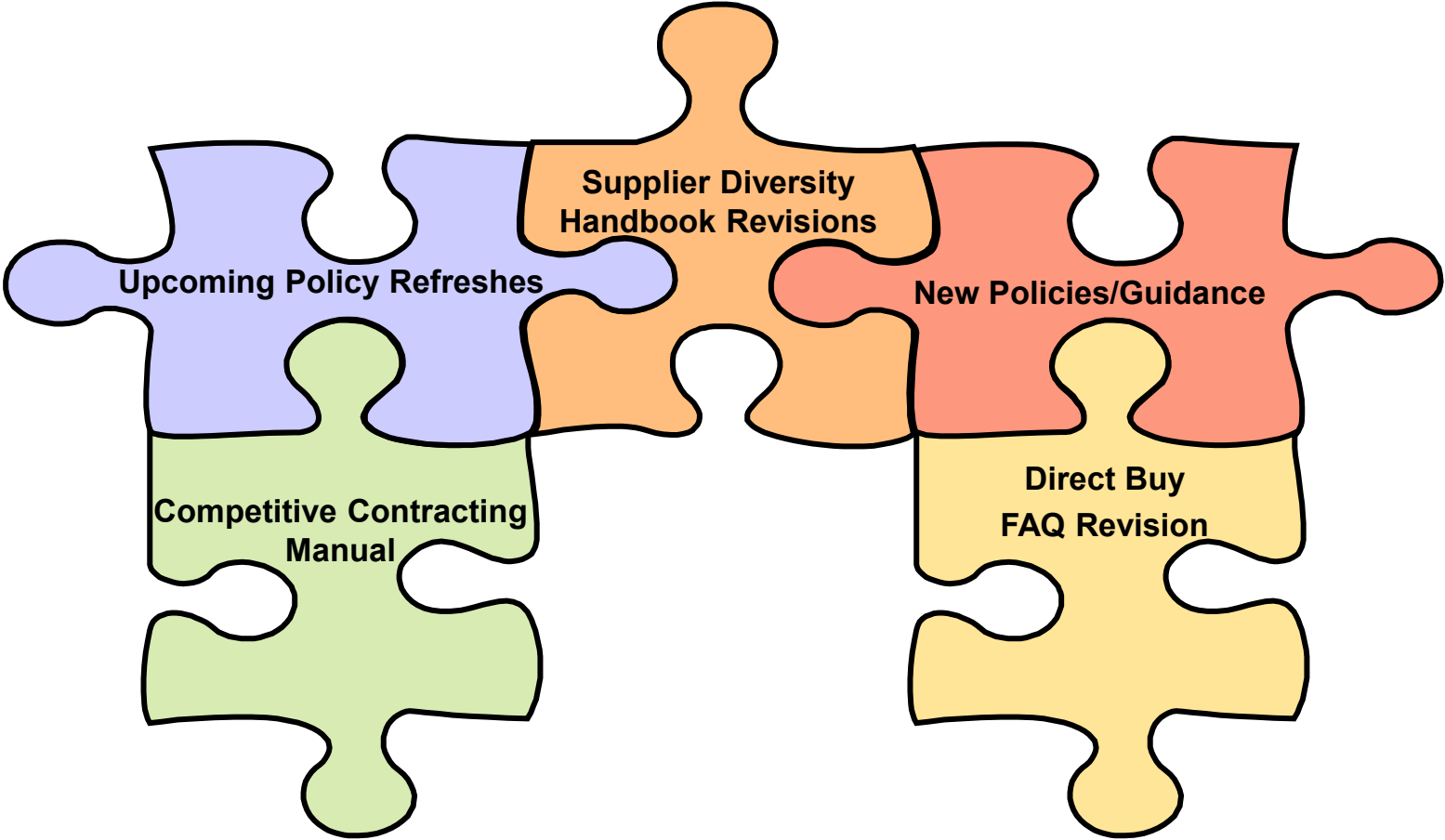
QUESTIONS



ENTERPRISE PROCUREMENT POLICIES UPDATE

ENTERPRISE PROCUREMENT POLICY UPDATE

PURPOSE: Provide updates on the Enterprise Procurement Policy Projects and inform stakeholders of the next steps.





Upcoming Policy Refreshes

UPCOMING POLICY REFRESHES

Enterprise Procurement Policy	Current Sunset Date
Polychlorinated Biphenyls (PCBs) Purchasing Preference	January 2024
Purchases of Washington Grown Food	February 2024
Sole Source Contracts	April 2024
Delegation of Authority	April 2024
Executive Order 18-03	June 2024



Polychlorinated Biphenyls (PCBs) Policy

POLYCHLORINATED BIPHENYLS (PCBS) PURCHASING PREFERENCE

Current Status

- Current policy had a sunset review date of January 1, 2024.
- DES is proposing major revisions to the policy:
 - Alternative to testing requirements.
 - Certification of alternative to testing requirements.



POLYCHLORINATED BIPHENYLS (PCBS) PURCHASING PREFERENCE

Next Steps

- Provide draft policy for stakeholders review and incorporate feedback.
- Coordinate with training team for implementation.
- Publish revised policy and related documents by March 2024.



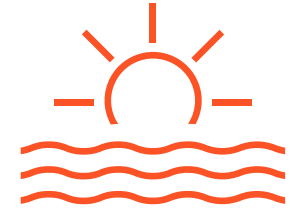


Washington Grown Food Policy

PURCHASES OF WASHINGTON GROWN FOOD

Current Status

- Current policy has a sunset review date of February 20, 2024.
- Efforts are underway to revise the policy.
 - Conduct research and stakeholder work to identify gaps in the current policy.



PURCHASES OF WASHINGTON GROWN FOOD

Next Steps

- Conduct survey to determine agency use of the Purchases of Washington Grown Food policy.
- Create revised policy based on identified gaps.
- Provide draft for stakeholder review.
- Publish revised policy and related documents by March 2024.



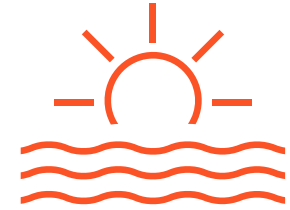


Sole Source Contracts Policy

SOLE SOURCE REFRESH

Current Status

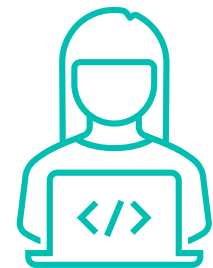
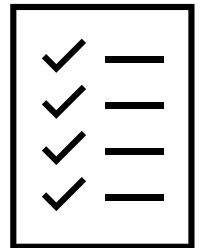
- Sunset review date for the current policy is April 3, 2024.
- Initial stakeholder work conducted in August 2023 through a survey.
- DES Policy discussed the identified gaps with internal DES leadership/stakeholders.
- Draft pending leadership review and approval.



SOLE SOURCE REFRESH

Based on identified gaps, DES intends to strengthen the policy in the following areas:

- Market research expectations
- Increasing WEBS posting and sole source filing timelines
- Aligning with the DES Supplier Diversity Policy
- Sole source exemptions
- Capability statements
- Adherence to all applicable OCIO policies



SOLE SOURCE REFRESH

Next steps

- Share draft policy packet with stakeholders and seek feedback in February 2024.
- Incorporate feedback received in March 2024.
- Publish a revised policy packet by April 2024.



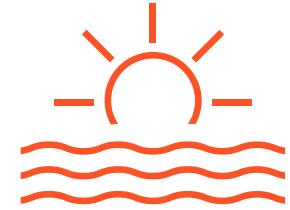


Delegation of Authority Policy

DELEGATION OF AUTHORITY POLICY

Current Status

- Sunset review date for the current policy is April 2024.
- Efforts are underway to revise the policy.
 - Alignment with the new procurement risk assessment process.



DELEGATION OF AUTHORITY POLICY

Next Steps

- Incorporate revisions to the policy based on changes to the procurement risk assessment process.
- Provide draft policy for stakeholders review and incorporate feedback.
- Publish revised policy and related documents by April 2024.



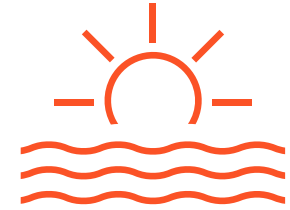


Executive Order 18-03 Policy

EXECUTIVE ORDER 18-03 POLICY

Current Status

- Sunset review date for the current policy is June 2024.
- Conduct research and stakeholder work to identify gaps in the current policy.
 - Review published related materials, including the report sent to the legislature in May 2023.



EXECUTIVE ORDER 18-03



Next Steps

February

Research

- Review current policy to identify gaps.
- Initial stakeholder engagement through survey.

March

Revise policy and share with stakeholders for feedback.

April – May

Incorporate stakeholder feedback.

June

Post revised policy and responses to stakeholder feedback.

QUESTIONS ON THE POLICY REFRESHES

Enterprise Procurement Policy Refreshes

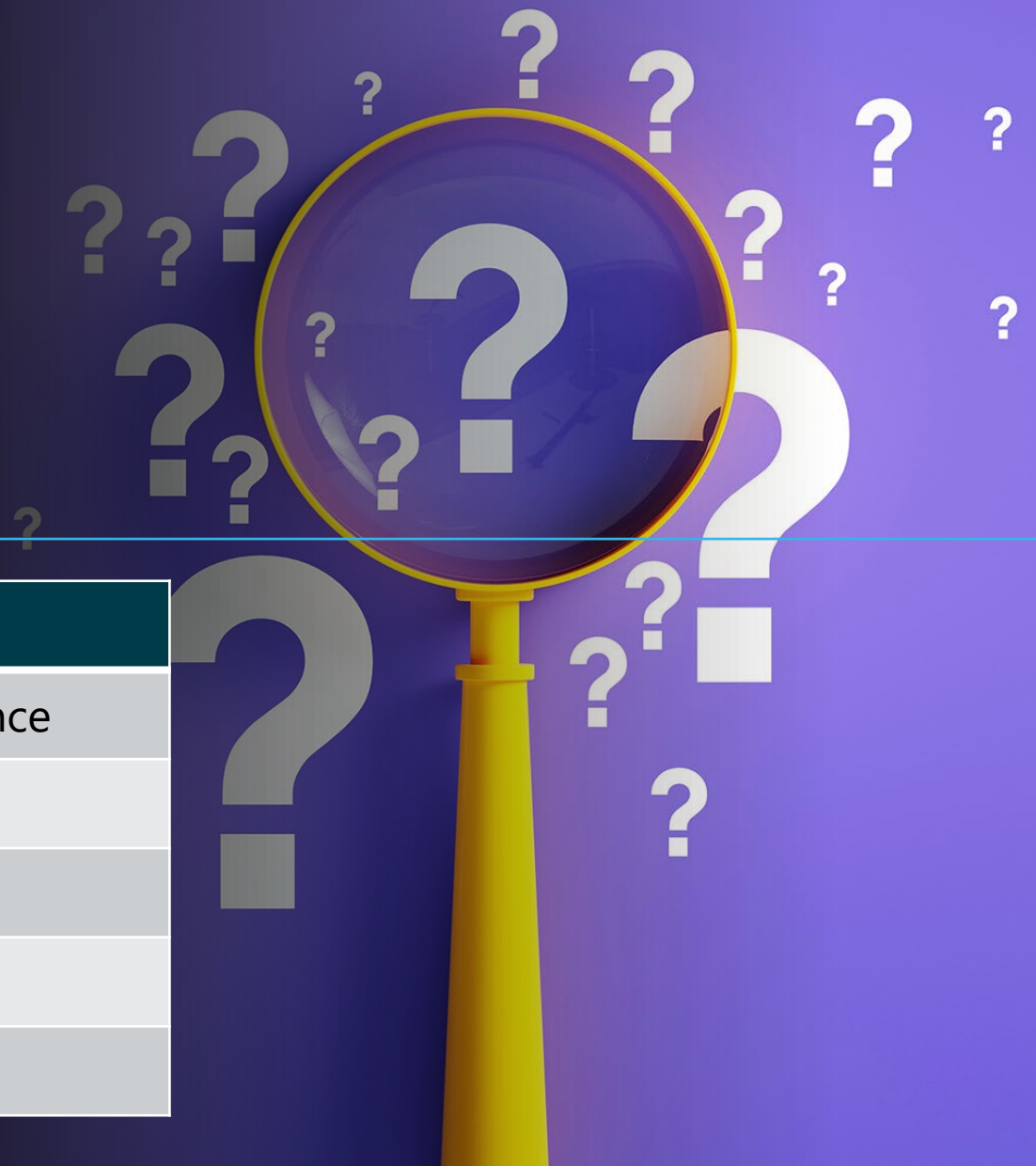
Polychlorinated Biphenyls (PCBs) Purchasing Preference

Purchases of Washington Grown Food

Sole Source Contracts

Delegation of Authority

Executive Order 18-03





**Supplier Diversity
Handbook Revisions**

SUPPLIER DIVERSITY POLICY HANDBOOK

Purpose of revisions

- Over 1,000 staff attended the Lunch 'n' Learn sessions in June and October.
- Clarify language in Policy and Handbook and add inadvertently omitted language
- Add clarifying Q&A entries created in part during June Lunch 'n' Learn sessions



SUPPLIER DIVERSITY POLICY HANDBOOK

Status

- Proposed revisions pending leadership review and approval.
- Add clarifying Q&A entries created in part during June Lunch 'n Learn sessions:
 - Checklist 1
 - Glossary
 - Forecasting
 - Outreach
 - Unbundling
 - \$150,000 Solicitations
 - Pre-bid Conferences
 - Solicitation/Contract Language
 - Evaluation Points
 - Reserved awards
 - Exceptions

SUPPLIER DIVERSITY POLICY HANDBOOK

Next Steps

- Following approval, share a copy of the revisions with PCAG for awareness.
- Publish the revisions and alert all stakeholders by January 2024.
- OMWBE Workshops will be held in partnership with DES and WDVA.



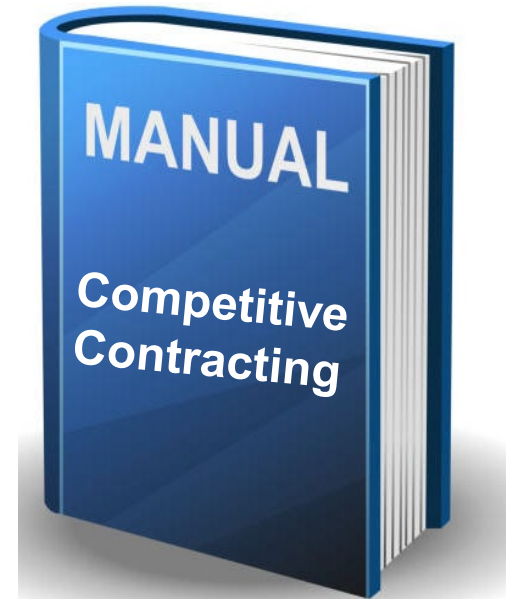


Competitive Contracting Manual

COMPETITIVE CONTRACTING MANUAL

Purpose of revision

- The current, 15-year-old competitive contracting manual needs to be updated.
- The new contract management requirements outlined in the HB 1521 is the key driver for updates.
- In addition to incorporating the HB 1521 requirements, DES is reviewing the entire manual for relevance and currency.



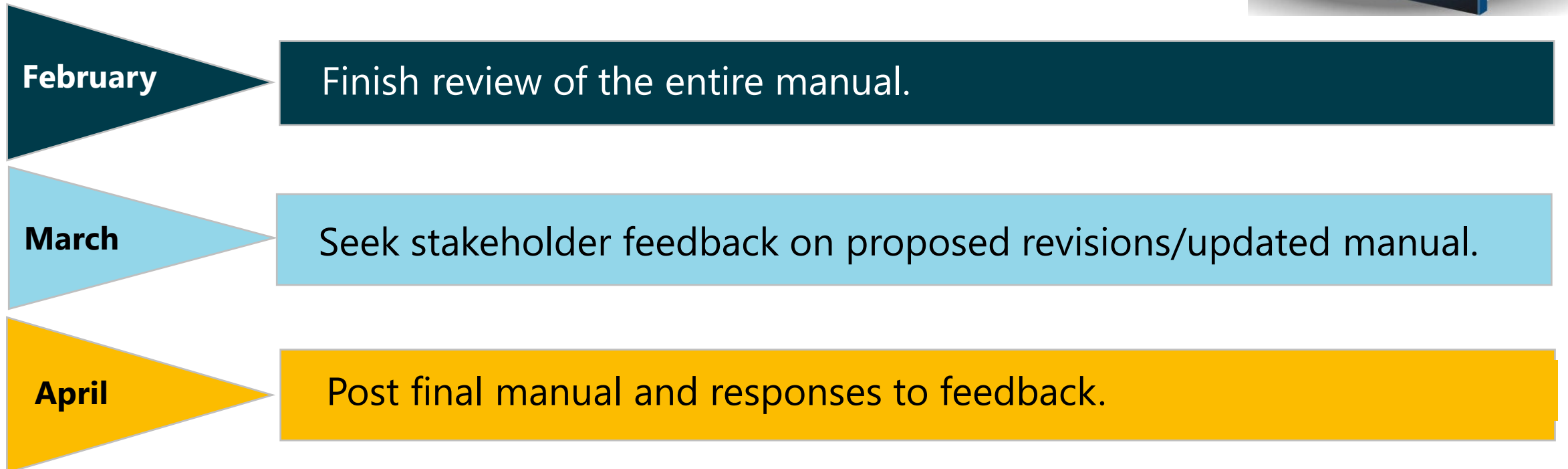
MILESTONE ACCOMPLISHED AND OUTSTANDING ACTIVITIES

Current Status

Identified impacts of HB 1521 to the Competitive Contracting Manual.



2024 Activities and Estimated Timelines





DIRECT BUY FAQ REVISION

Purpose of revision

- DES Policy has received multiple inquiries requesting clarification around repetitive direct buy purchases.

Status

- DES Policy developed a draft revision to [Direct Buy FAQ #4](#).
- Internal stakeholder work is complete.
- Revisions pending leadership review and approval.



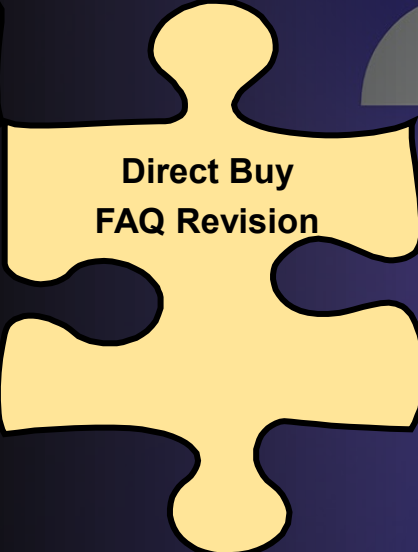
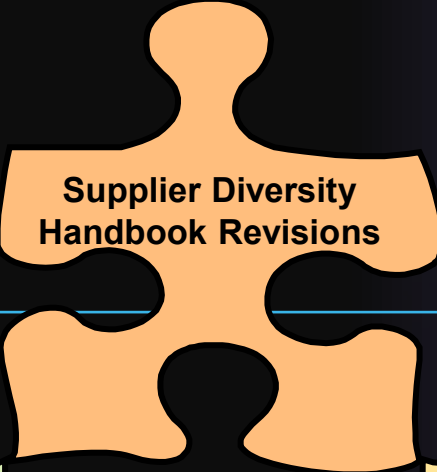
DIRECT BUY FAQ REVISION

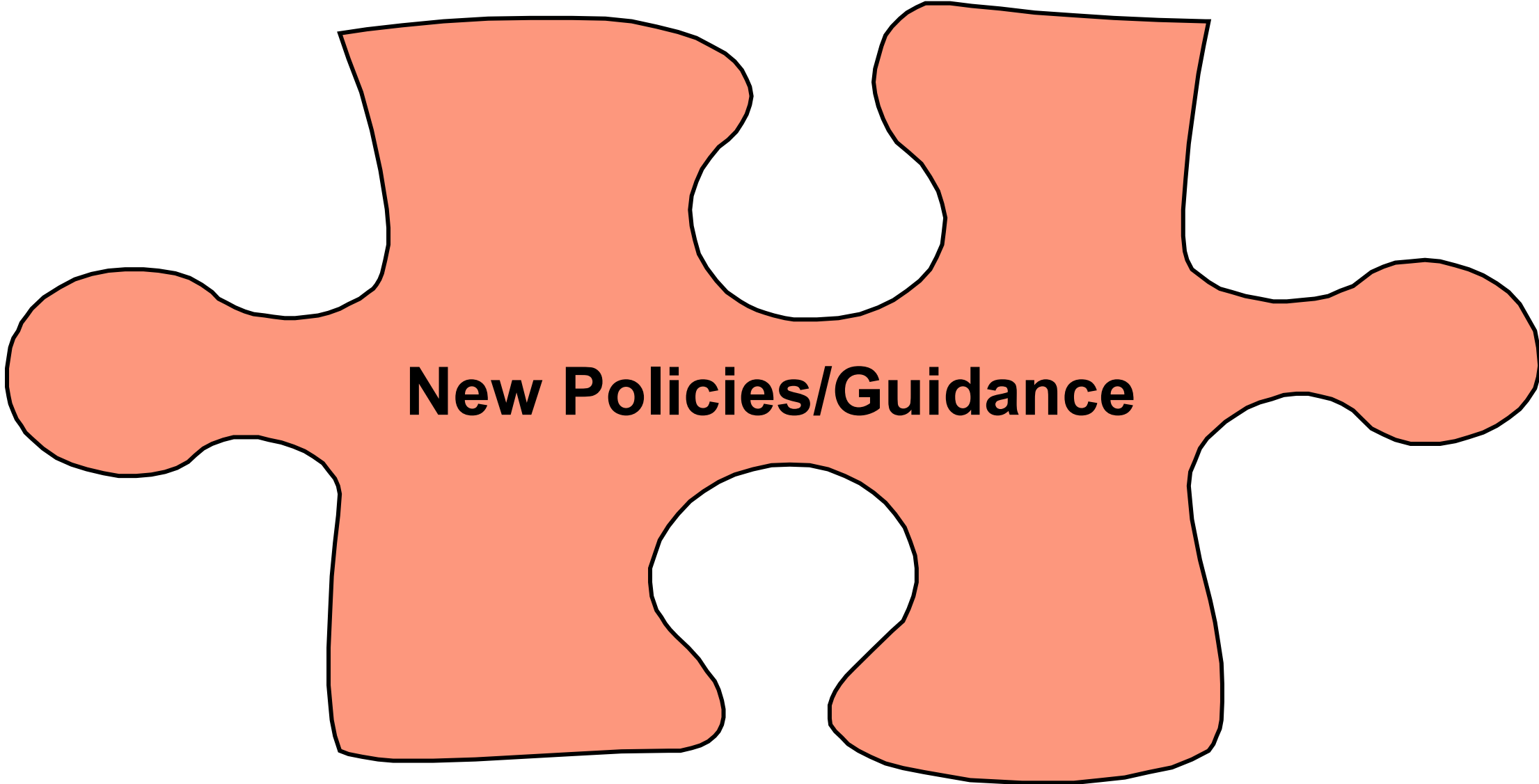
Next Steps

- Following approval, share a copy of the revised FAQ with PCAG for awareness.
- Publish the revised FAQ and alert all stakeholders.



QUESTIONS





Policies/Guidance	Goal(s)	Status
Client Services	Support state agencies to effectively and efficiently establish and manage client service contracts.	<ul style="list-style-type: none"> Developing policy/guidance outline
Interagency Agreements	To provide guidance and structure for an effective relationship between parties entering into an interagency agreement, help the relationship be fruitful, and gives it a better chance of success.	<ul style="list-style-type: none"> Researching and analyzing information.
Convenience Contracts	To support state agencies to effectively and efficiently establish and manage their convenience contracts.	<ul style="list-style-type: none"> Drafted a policy Preparing for stakeholder engagement
Cooperative Purchasing Agreements	To prescribe the guidance to be followed by state agencies to account for and control cooperative agreements.	<ul style="list-style-type: none"> Researching analyzing information.
Grants	To prescribe the guidance to be followed by state agencies to account for and control grants agreements.	<ul style="list-style-type: none"> Researching and analyzing information.

NEW POLICY: CONVENIENCE CONTRACTS

Reason for policy

- DES Policy has received multiple requests for clarification and guidance around RCW [39.26.070](#), Convenience contracts.



Status

- DES Policy developed a draft convenience contracts policy and procedure.



Next steps

- Pending leadership review and approval, provide drafts to internal and external stakeholders for initial feedback.



QUESTIONS: NEW POLICIES



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THANK YOU



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[Current Enterprise Procurement Policies \(des.wa.gov\)](https://des.wa.gov)